Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

SBERTTARY OF THE SENATE

16 NOV 29 PH 12: 40

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached: ☐ The <u>original</u> Employee Pre-Travel Authorization (Form RE-1), <u>AND</u> A copy of the Private Sponsor Travel Certification Form with all attachments (itinerary, invitee list, etc.) Private Sponsor(s) (list all): Alliance for Excellent Education Travel date(s): October 17, 2016 - October 19, 2016 Name of accompanying family member (if any): _____ Relationship to Traveler:

Spouse ☐ Child IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.) Expenses for Employee: Transportation **Lodging Expenses** Meal Expenses Other Expenses **Expenses** (Amount & Description) ☐ Good Faith \$650.27 \$692.20 \$124.08 Estimate ☑ Actual Amount Expenses for Accompanying Spouse or Dependent Child (if applicable): Transportation Lodging Expenses Meal Expenses Other Expenses Expenses (Amount & Description) ☐ Good Faith **Estimate** ☐ Actual Amount Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Site visit and tour to two Los Angeles Linked Learning schools. (Printed name of traveler) TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER: have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

(Revised 1/3/11)

C)



August 23, 2016

Dear:

The Alliance for Excellent Education (the Alliance) invites you to participate in a site visit demonstrating Linked Learning, a systemic approach to high school reform that aligns the high school experience with in-demand industry sectors and occupations. The site visit will include visits to two high schools in the Los Angeles Unified School District (LAUSD) in Los Angeles, California on **Tuesday**, October 18, 2016. The Alliance will pay for the cost of your travel for this site visit. Logistical information is included following this invitation.

More than 65,000 students in California are participating in Linked Learning, an approach to education that transforms the traditional high school experience by integrating rigorous academics, career technical education, work-based learning, and supports for students. Linked Learning creates meaningful learning experiences through career-themed pathways in fields such as engineering, health care, performing arts, and law through collaborations with local education agencies, employers, higher education institutions, and other community partners. Evidence demonstrates that students participating in certified Linked Learning pathways have higher graduation rates and are more likely to enroll in college with the knowledge and skills that will prepare them for the twenty-first century. Although the Linked Learning approach originated in California, it is now being implemented in other school districts across the country.

I invite you to view first-hand the impact of the Linked Learning approach in Los Angeles Unified School District (LAUSD), home to 640,000 students, 81 percent of whom are from low-income families and 90 percent of whom are students of color. LAUSD offers more than forty Linked Learning pathway options to students and is the recipient of the federal Youth CareerConnect grant, which expanded the district's ability to collaborate with community colleges and employers through initiatives, such as dual-enrollment and work-based learning opportunities, to ensure that more students are graduating from high school ready for college and a career.

This invitation is extended to you or an appropriate designee. Please respond to Monica Almond at malmond@all4ed.org by Tuesday, September 6 so that we can work with you to get Ethics Committee approval. I hope you are available to participate and learn about one of the nation's most promising efforts to prepare today's students for the twenty-first-century economy.

Respectfully,

Bob Wise President



The Linked Learning Approach to Preparing Students for College and a Career: Site Visit to Los Angeles Unified School District

Los Angeles, CA • October 18, 2016

W Hotel Hollywood 6250 Hollywood Boulevard, Los Angeles, CA, 90028 • (323) 798-1300

The goal of this site visit is for participants to learn about Linked Learning, a promising, systemic high school reform strategy that prepares students for postsecondary education and high-wage careers in indemand industry sectors. Invited participants include congressional staff, U.S. Department of Education staff, and state-level practitioners and policymakers. Participants will visit two schools within Los Angeles Unified School District (LAUSD)—STEM Academy at Helen Bernstein High School and Los Angeles High School of the Arts (LAHSA) at the Robert K. Kennedy Community Schools—to learn about the approach firsthand from students, teachers, administrators, and other partners involved in Linked Learning. Participants will also learn about state and federal policies, such as the Carl D. Perkins Career and Technical Education Act, that are currently supporting the Linked Learning approach and can scale up high-quality career academy models.

LAUSD received \$7 million in Youth CareerConnect funding through the U.S. Department of Labor to provide high school students with education and training that combines rigorous academics and technical curricula focused on in-demand occupations and industries in the science, technology, engineering, and mathematics (STEM) fields. Six pathways are benefiting from this funding, one of which will be showcased during this site visit—STEM Academy.

Los Angeles High School of the Arts (LAHSA) is a wall-to-wall Linked Learning high school that instructs students in the performing and technical arts with 428 students enrolled in School Year (SY) 2015–16. Since LAHSA became a Linked Learning—certified site in SY 2010–11, its students have shown tremendous growth. During SY 2015–16, LAHSA students overall outperformed their LAUSD peers in English language arts by 16 percentage points, and economically disadvantaged students at LAHSA outperformed their LAUSD peers by 13 percentage points. Additionally, LAHSA has a four-year adjusted cohort graduation rate that is 5 percentage points higher than LAUSD.

STEM Academy is also a wall-to-wall Linked Learning high school and a Youth CareerConnect beneficiary housed within Helen Bernstein High School. All of the nearly 600 STEM students are enrolled in either the medicine or engineering pathway. Students at STEM are outperforming their peers across several indicators. Overall, they outperform their Bernstein peers in math by almost 10 percentage points, while economically disadvantaged students at STEM outperform their LAUSD peers by 6 percentage points in math. STEM students are graduating at higher rates (79.6 percent) than their non—Linked Learning peers on campus (70.2 percent), and their LAUSD peers (72.2 percent). Finally, the percentage of STEM students meeting course requirements for admissions to California's state universities grew substantially over a three-year period—from 33.9 percent in 2013 to 57.7 percent in 2015. Now, more graduating seniors at STEM are meeting these college-ready requirements than their LAUSD peers (51.7 percent) as well as their peers across the state (43.4 percent).

A wall-to-wall Linked Learning high school enrolls all of its students in Linked Learning pathways.



The Linked Learning Approach to Preparing Students for College and a Career: Site Visit to Los Angeles Unified School District (LAUSD)

Tuesday, October 18, 2016

Preliminary Agenda

School #1: STEM Academy at Helen Bernstein High School

School #2: Los Angeles High School of the Arts (LAHSA) (Robert F. Kennedy Community Schools)

8:00 a.m. Travel to School #1: STEM Academy at Helen Bernstein High School

1309 N. Wilton Place, Los Angeles, CA (323)817-6461

8:30 a.m. Welcome

Paul Hirsch, Principal

Bob Wise, President, Alliance for Excellent Education

Overview of Linked Learning Implementation in LAUSD

Esther Soliman, Linked Learning Administrator, LAUSD

William Bass, Program and Policy Development Advisor, LAUSD

Linked Learning Implementation at STEM

Paul Hirsch

9:35 a.m. Classroom Tours

10:20 a.m. Project-Based Demonstration

11:15 a.m. Travel to School #2: LAHSA

701 S. Catalina Street, Los Angeles, CA (213)480-4600

11:45 a.m. Welcome and School Overview

Susan Canjura, Principal, LAHSA

12:00 p.m. Lunch and Discussion with LAUSD Community

1:10 p.m. Classroom Tours

2:00 p.m. Project-Based Demonstration

3:00 p.m. Implications for Policy

4:00 p.m. Break

5:00 p.m. Dinner

7:00 p.m. Conclusion of Site Visit

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Sp	onsor(s) of the trip (please list all sponsors): Alliance for Excellent Education
	· · · · · · · · · · · · · · · · · · ·
De	scription of the trip: A site visit and demonstration for federal and national policy experts to visit
ar	d tour California Linked Learning high schools.
D٤	tes of travel: October 17-19, 2016
Pla	ice of travel: Los Angeles, CA
Na	me and title of Senate invitees: (see addendum)
I c	ertify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
~	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	= AND =
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
i c	ertify that:
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal

except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
	Two overnight stays are required because the event will take place in California, and the distance and
	travel time required is lengthy and warrants a second night.
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Alliance for Excellent Education will invite and convene attendees, arrange, travel, compile the event
	agenda, and help to facilitate all event activities taking place on October 18, 2016 in Los Angeles, CA.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Alliance for Excellent Education is a national policy and advocacy organization that is dedicated to
	ensuring that all students graduate from high school prepared for postsecondary education. The Linked
	Learning approach to education in California closely aligns with the Alliance's mission
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Alliance sponsored its first trip in September of 2014 to Porterville, CA. We took a group of
	congressional staffers to visit Linked Learning implementation in Porterville Unified School District,
	September 24-26, 2014.

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The Alliance encoura	ages the development an	d implementation of	federal and national	policies that
support effective high	n school reform. It works	to synthesize and d	istribute research an	d information al
promising practices t	hat informs national disc	ourse.		
Total Expenses for Ea	ach Participant:			
-	Transportation Expenses	Lodging Expenses	Meal Expenses	Other
Good Faith estimate Actual Amounts	\$800	\$700	\$220	
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21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:		
	The federal per diem rates for Los Angeles are \$150/night for lodging and \$64/day for MIE. The rates		
	above are higher than the federal per diem rates. However, based on the accommodations required to		
	accommodate all guests and activitles corresponding with this event, these are the anticipated expenses.		
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:		
	Coach transportation will be provided.		
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).		
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:		
	N/A		
25.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.): Signature of Travel Sponsor:		
	Name and Title: Bob Wise, President		
	Name of Organization: Alliance for Excellent Education		
	Address: 1201 Connecticut Avenue, NW, Suite 901, Washington, DC 20032		
	Telephone Number: (202) 261-9864		
	Fax Number: (202) 828-0821		
	E-mail Address: malmond@all4ed.org (contact: Monica Almond)		

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PRIVATE SPONSOR TRAVEL CERTIFICATE FORM

Sponsor: Alliance for Excellent Education Event Date: October 18, 2016

Question 5—Name and title of Senate invitees:

Staffer Invitee	Office
Karishma Merchant	Sen. Tim Kaine
Brian Moulton	Sen. Tammy Baldwin
Megan Harrington	Sen. Rob Portman
Dan Auger	Sen. Kelly Ayotte
Dana Richter	Sen. Shelly Moore Capito
Brett Layson	Sen. Johnny Isakson
Joshua Delaney	Sen. Elizabeth Warren
Amanda Beaumont	Sen. Patty Murray
Allie Kimmel	Sen. Patty Murray
Sarah Bolton	Sen. Patty Murray
Scott Cheney	Sen. Patty Murray
Leanne Hotek	Sen. Patty Murray
Jared Solomon	Sen. Bob Casey
William Knudsen	Sen. Lamar Alexander
Lindsay Fryer	Sen. Lamar Alexander
Peter Oppenheim	Sen. Lamar Alexander
Steve Townsend	Sen. Mike Enzi



The Linked Learning Approach to Preparing Students for College and a Career: Site Visit to Los Angeles Unified School District Los Angeles, CA

W Hotel Hollywood 6250 Hollywood Boulevard Los Angeles, CA 90028 Phone: (323) 798-1300

Tuesday, October 18, 2016

Preliminary AGENDA

7:00-7:45am	Breakfast: Welcome & Introduction Bob Wise, President, Alliance for Excellent Education
8:30-9:30am	District Welcome STEM Academy at Helen Bernstein High School 1309 N. Wilton Place, Los Angeles, CA
	Esther Soliman, Linked Learning Administrator, LAUSD
	Christopher Cabaldon, Executive Director, Linked Learning Alliance
	Bob Wise, President, Alliance for Excellent Education
9:30-9:50am	An Overview of Linked Learning Gary Hoachlander, Ph.D., President, ConnectEd: The California Center for College and Career
	The Equity Imperative Tameka McGlawn, Ph.D., Director, Equity and Impact, ConnectEd
9:50-10:05am	Linked Learning Implementation at STEM Paul Hirsch, Principal,
10:05-10:15am	Break
10:15-10:45am	Classroom Tours
10:45-11:30am	Student Project-based Demonstration

11:40-12:00pm	Travel to Site #2: Los Angeles High School of the Arts (LAHSA) 701 S. Catalina Street, Los Angeles, CA (213) 480-4600
12:00-1:00pm	Luncheon Welcome at LAHSA Los Angeles High School of the Arts (Robert F. Kennedy Community Schools) 701 S. Catalina Street, Los Angeles, CA
	Linked Learning Implementation at LAHSA Susan Canjura, Principal
	Panel Presentation with Linked Learning Stakeholders
1:00-1:15pm	Q&A with Linked Learning Stakeholders
1:15-1:45pm	Table Discussion with Linked Learning Stakeholders & Practitioners
1:45-2:00pm	Break
2:00-2:40pm	Classroom Tours
2:40-3:25pm	Student Project-based Demonstration
3:25-3:40pm	Break
3:45-4:45pm	Implications for Policy
	Phillip Lovell, Vice President of Policy and Advocacy, All4Ed
	Christopher Cabaldon, Executive Director, Linked Learning Alliance
	Gary Hoachlander, President, ConnectEd
4:45 – 5:15 pm	Q&A
5:15-5:30pm	Closing Remarks
6:00-8:00pm	Dinner

Sample Itinerary

(Roundtrip Flight via American Airlines)

Monday, October 17th: leaves Reagan Washington National Airport at 5:39pm and arrives into Los Angeles International Airport at 8:20pm

Wednesday, October 19th: leaves Los Angeles International Airport at 8:30am and arrives into Reagan Washington National Airport at 4:41pm.



Equity and Excellence Through the Linked Learning Approach: A Site Visit to Los Angeles Unified School District (LAUSD)

October 18, 2016

Participants

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Deputy Superintendent of Instruction and Learning Support Branch California Department of Education tadams@cde.ca.gov

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The Honorable Maxine Waters

Representative for California's 43rd District U.S. House of Representatives

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Michael Yudin

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The Raben Group
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Date/Time Stamp: EMPLOYEE PRE-TRAVEL AUTHORIZATION Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure. Amanda Beaumont Name of Traveler: Employing Office/Committee: HELP Committee - Senator Patty Murray Alliance for Excellent Education Private Sponsor(s) (list all): October 17-19, 2016 Travel date(s): Note: If you plan to extend the trip for any reason you must notify the Committee. Los Angeles, California Destination(s): Explain how this trip is specifically connected to the traveler's official or representational duties: This site visit will examine a type of high school reform called Linked Learning which seeks to foster collaboration between high schools, the workforce, and postsecondary education. As the lead staffer for Senator Murray on high school issues, the issues covered as part of this site visit are within my issue portfolio at work. Name of accompanying family member (if any): n/a Relationship to Employee: Spouse Child I certify that the information contained in this form is true, complete and correct to the best of my knowledge: TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain): Senator Patty Murray Amanda Beaumont (Print Senator's/Officer's Name) ___ hereby authorize (Print Traveler's Name) an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain. I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box)

(Revised 10/19/15)

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(Signature of Supervising Senator/Officer)

TELEPHONE: (202) 224-2881 FACSIMULE: (202) 224-7416 TDD: (202) 228-3752

JOHNNY ISAKSON, GEORGIA, CHAIRMAN BARBARA BOXER, CALIFORNIA, VICE CHAIRMAN

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United States Senate

SELECT COMMITTEE ON ETHICS

September 29, 2016

Amanda Beaumont
Committee on Health, Education, Labor, and Pensions
United States Senate
Washington, DC 20510

Dear Ms. Beaumont:

This responds to your recent correspondence concerning an invitation you received to travel to a site visit to the Los Angeles Unified School District in Los Angeles, California on October 17-19, 2016, sponsored by the Alliance for Excellent Education. The Alliance for Excellent Education certified to the Select Committee on Ethics (the Committee) that it will pay the necessary expenses related to the travel and that it is neither a lobbyist, nor lobbying firm, nor an agent of a foreign principal, and it is not otherwise acting as a representative or agent of a foreign government. However, the Alliance for Excellent Education has certified that it is a private entity that retains or employs a registered lobbyist, and that no registered lobbyist will accompany you on any segment of your trip.

Based on information and materials available to the Committee, and assuming the actual travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this one-day (exclusive of travel time and two overnight stays) trip may be accepted under relevant Senate Rules and the Committee's Regulations and Guidelines for Privately-Sponsored Travel, so long as at the time of the payment or reimbursement, the Alliance for Excellent Education is neither a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

¹ Based on the information you submitted, the Committee understands that, for a personal purpose, you intend to extend your trip in Los Angeles for less than 24 hours before the beginning of the officially related events. You are personally responsible for any additional expenses incurred as a result of extending your trip.

² The term "necessary expenses" has a specific definition. See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms at 8.

³ The term "any segment of your trip" has a specific definition. See id. at 3.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed Employee Pre-Travel Authorization and the Employee Post-Travel Disclosure of Travel Expenses (Form RE-1 and Form RE-2), along with a copy of the Private Sponsor Travel Certification Form, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) within 30 days of the conclusion of Privately-Sponsored Travel.⁴

Finally, Senate Rule 34 requires a reporting individual,⁵ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$375 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their annual Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Deborah Sue Mayer

Chief Counsel and Staff Director

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Enclosures: Travel Checklist

⁴ Trip extensions for any purpose do not extend this deadline.

⁵ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$123,175 for CY 2016) or is a political fund designee and is required to file an annual Financial Disclosure Report.